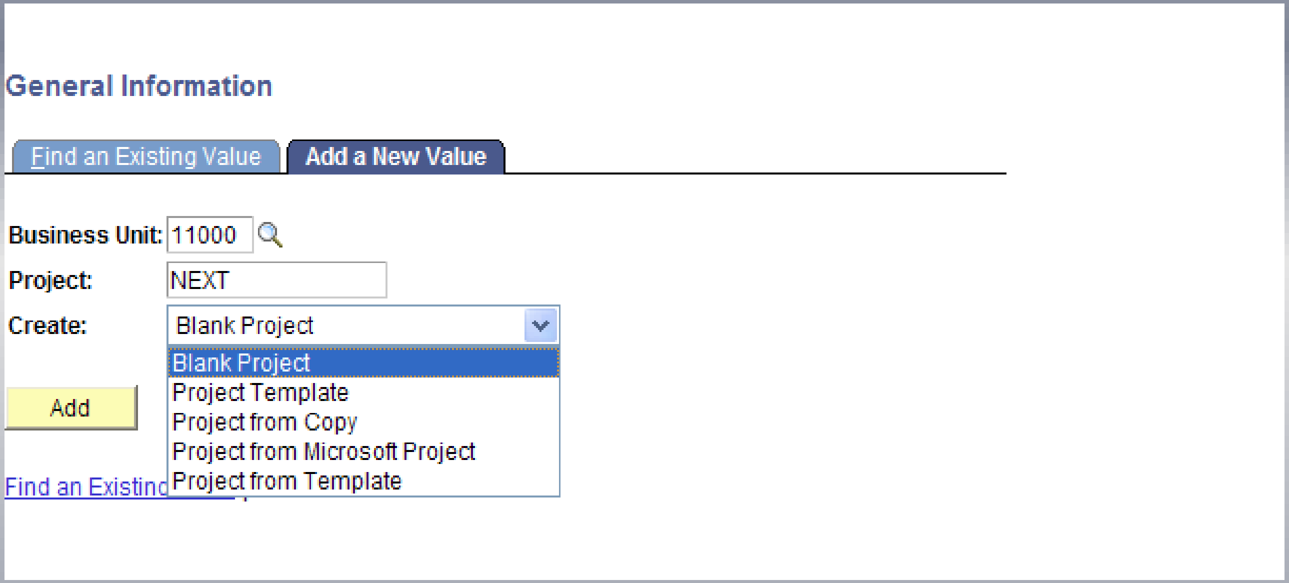
PROJECTS

9.0 Upgrade

Project Costing

To create a new project:

Navigation: Project Costing>Project Definitions>General Information



Drop down box options.

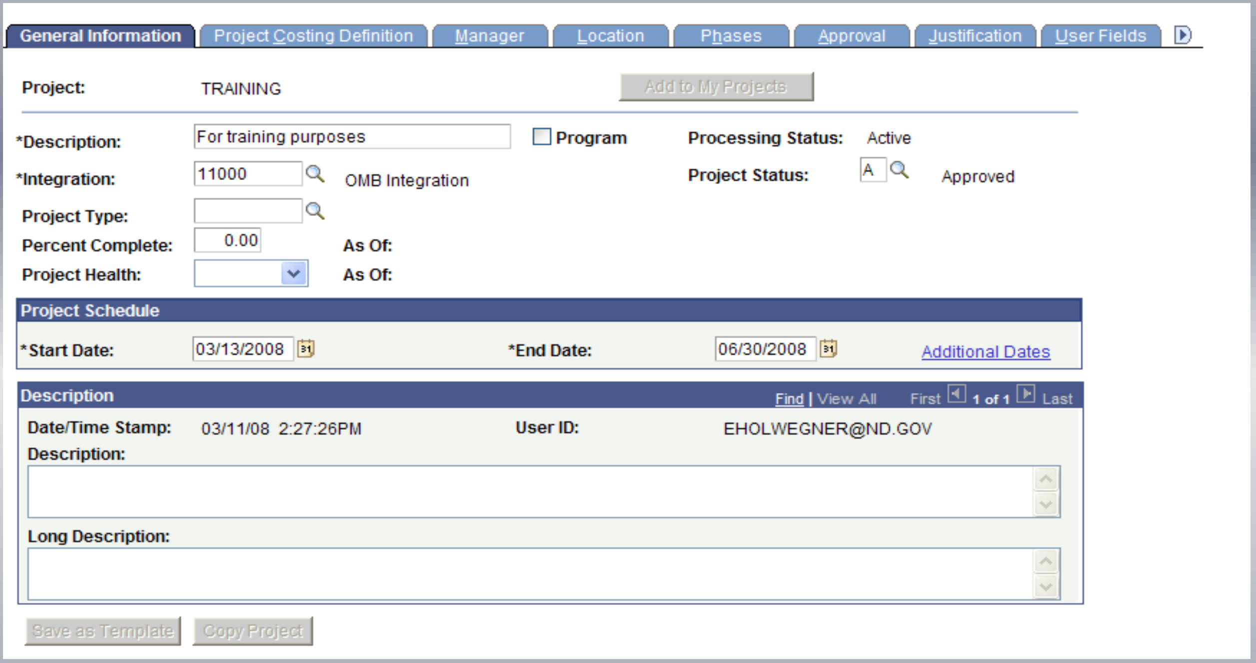
Blank Project: This is the default for create a new project.

Project Template: Create a template to use to set up future projects.

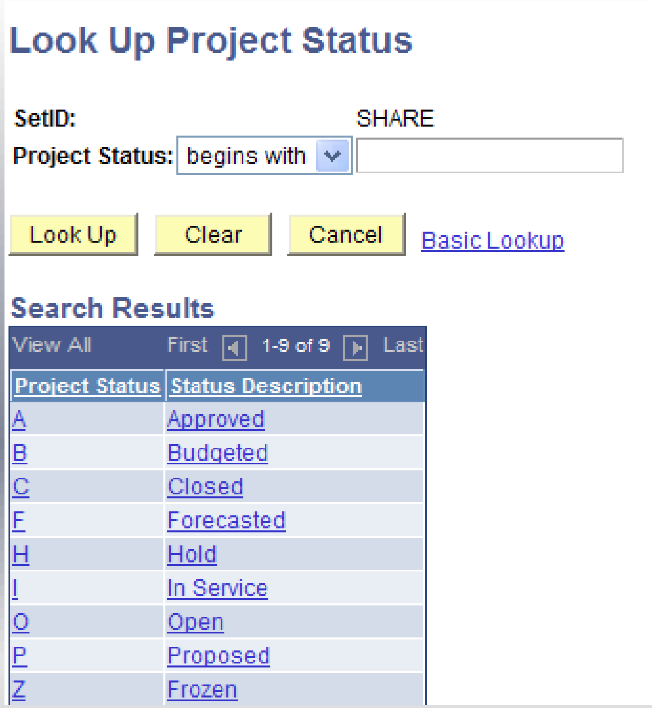
Project from Copy: Create a new project by copying an existing project.

Project from Template: Create a new project from a template you have set up.

Create a project using **Blank Project**: Give your Project a name or number and click on the ADD button. Note: If you forget to change the default of NEXT in the Project box, you will see NEXT in the Project name below. Don't save the screen below and go back to the General Information screen and give your project a name or number and add again.

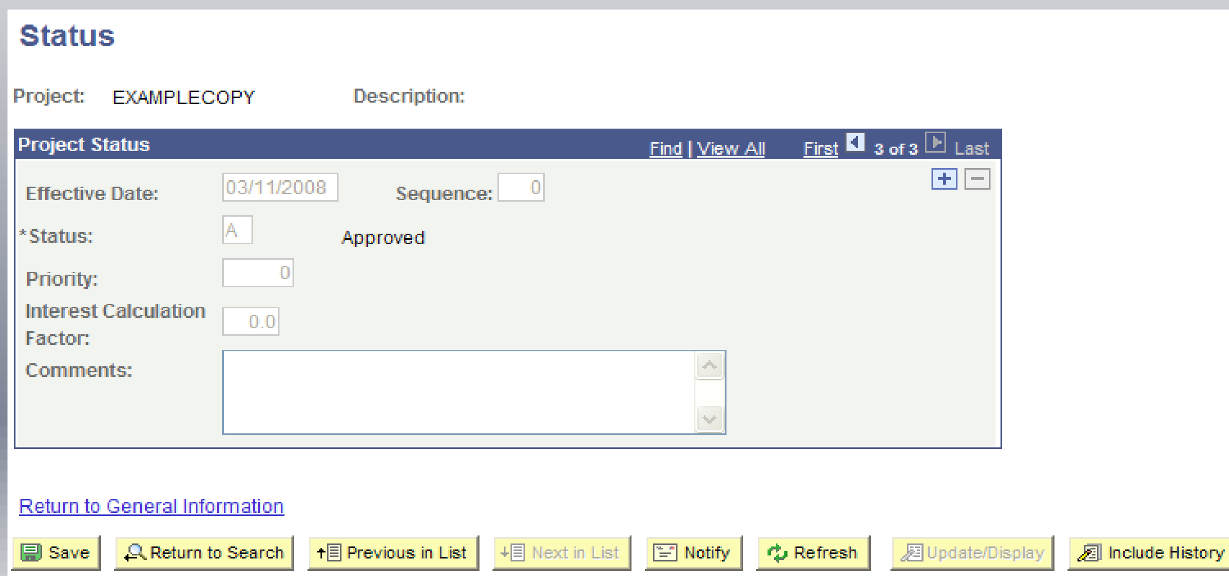


Note the Processing Status and Project Status information. Processing status of Active allows the project to be used with transactions. The Project Status is tied to the processing status and has a drop down box for you to select different options. However, when creating a new project, the processing status comes up Active and you have to select a Project Status that is tied to a Processing Status of Active. Those options are approved and open.

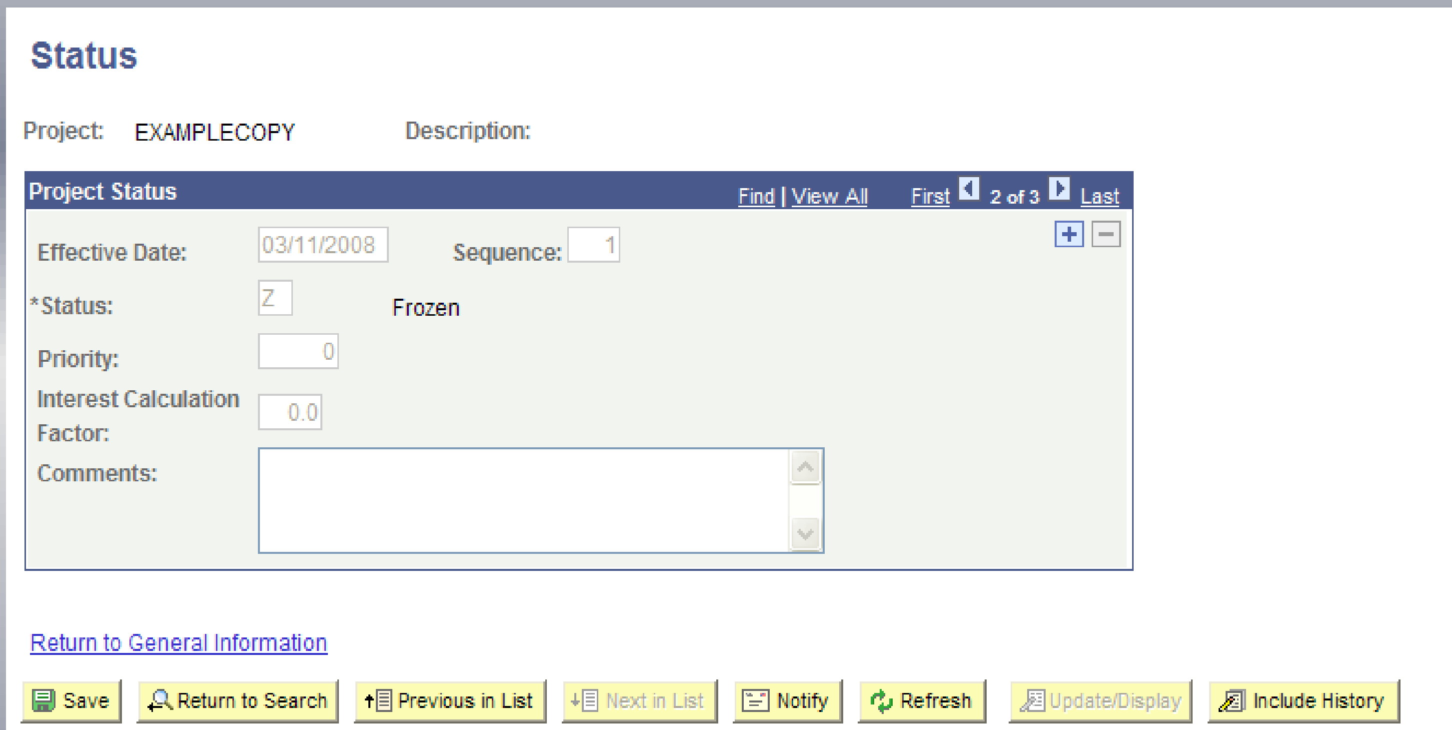


If you don't want the project to be used immediately, you can change the Project Status, which will change the Processing Status, after you have saved the project as approved. After you have saved, the Project Status of Approved is a hyperlink that you can click on. You would then add an additional Status, or more than one additional Status as shown below.

1. The Original Status the day project was created. Cannot change the effective date:

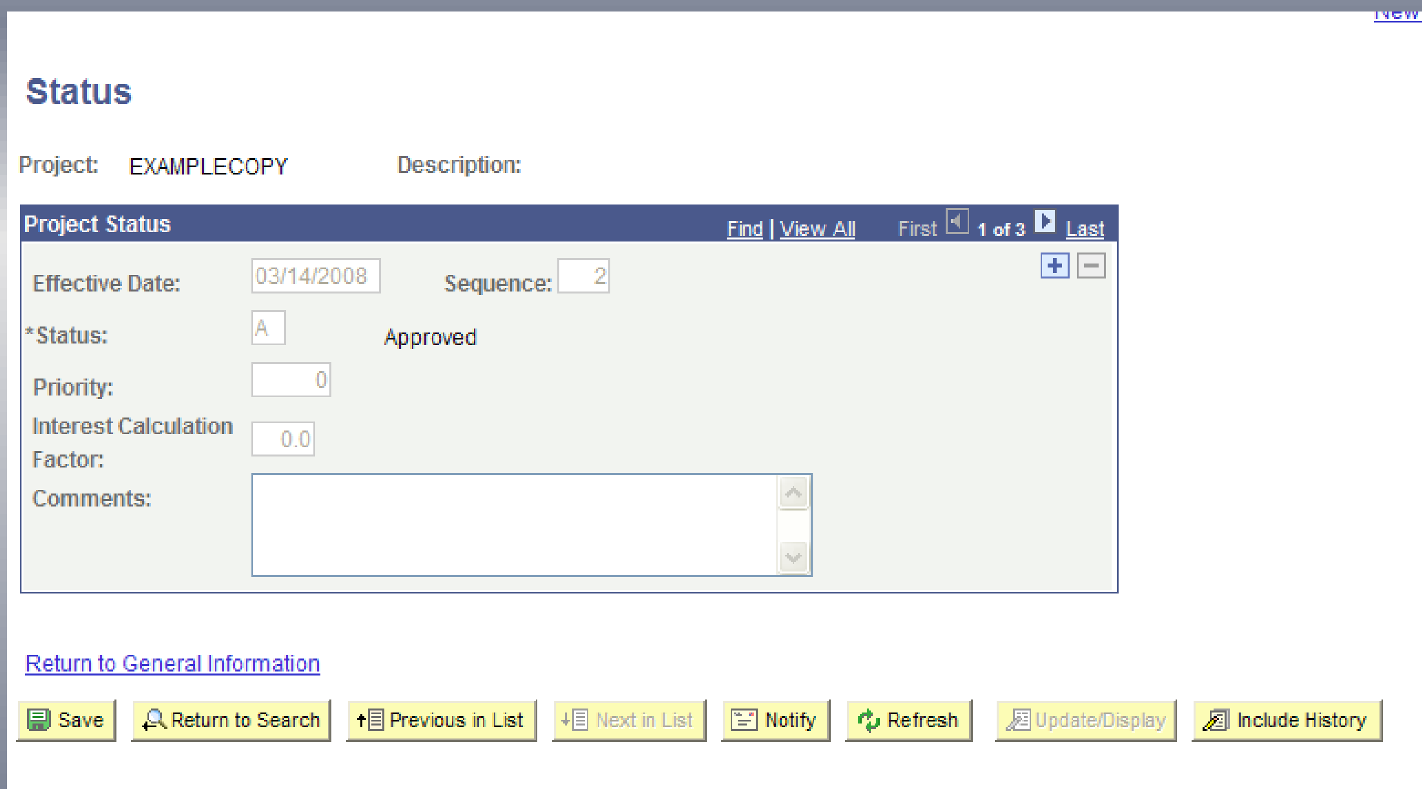


2. Same day project was created, used the + button and changed status to frozen with an effective date the same day the project was created. That changed the Processing Status to Inactive.



If you add a new status with the same effective date as the current status, you may get a warning that says effective date/sequence must be greater that the current one when you save. You can just change the sequence number to the next number if this happens.

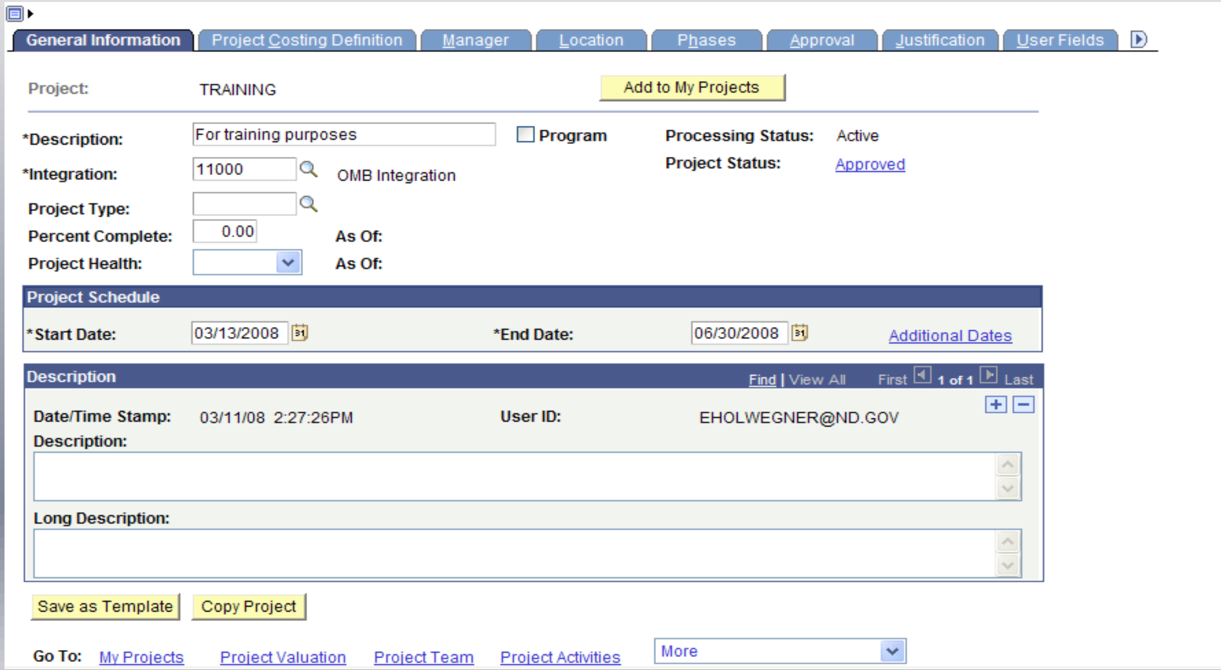
3. On the same day Project was created and after status was changed to frozen, added a status of Approved with a future effective date. The Processing Status will change to Active on that future date and can then be used with Transactions.

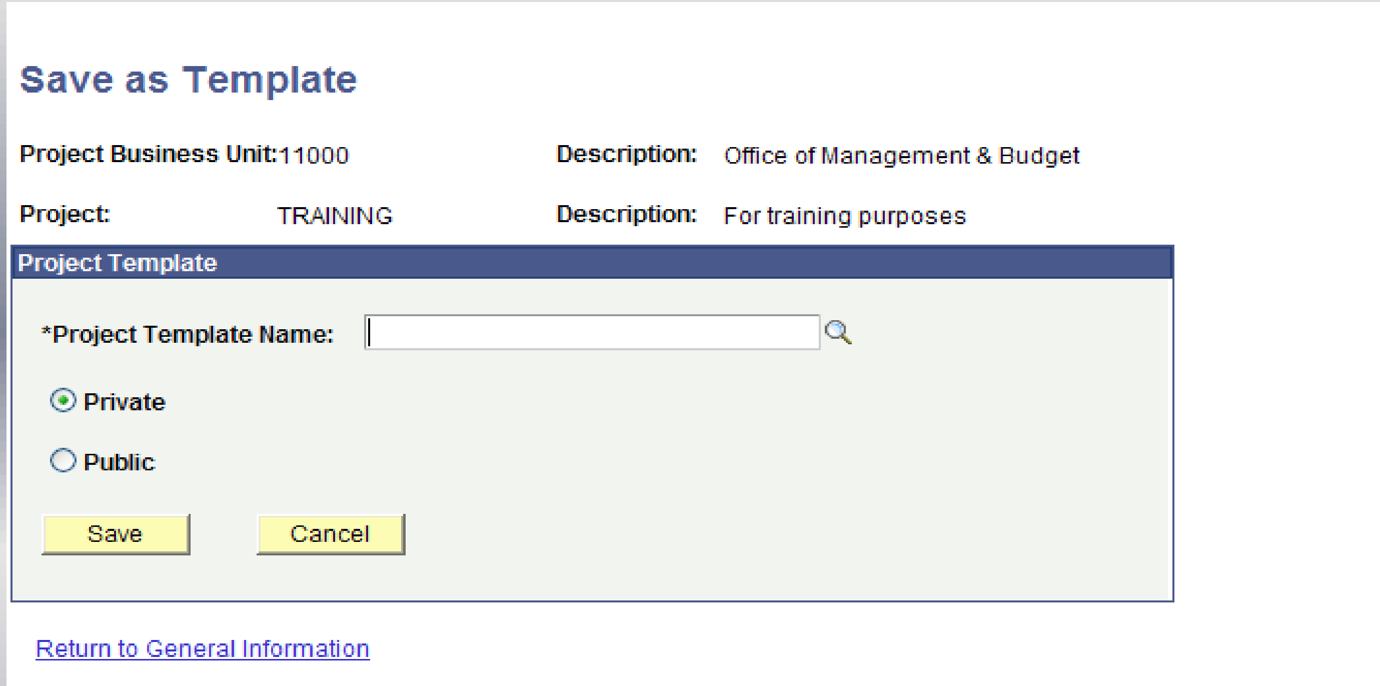


Note: See the hyperlinked Approved on Project Status below. This is what you use to change the Project Status. You can also close a project in the future by using the project status hyperlink and adding a status. Select closed status and fill in the date you want the project closed in the future. The project will be change to inactive status on that effective date.

The Project Schedule start and end dates are informational only. It's the effective date of the Project Status that effects the dates projects can be used for transactions.

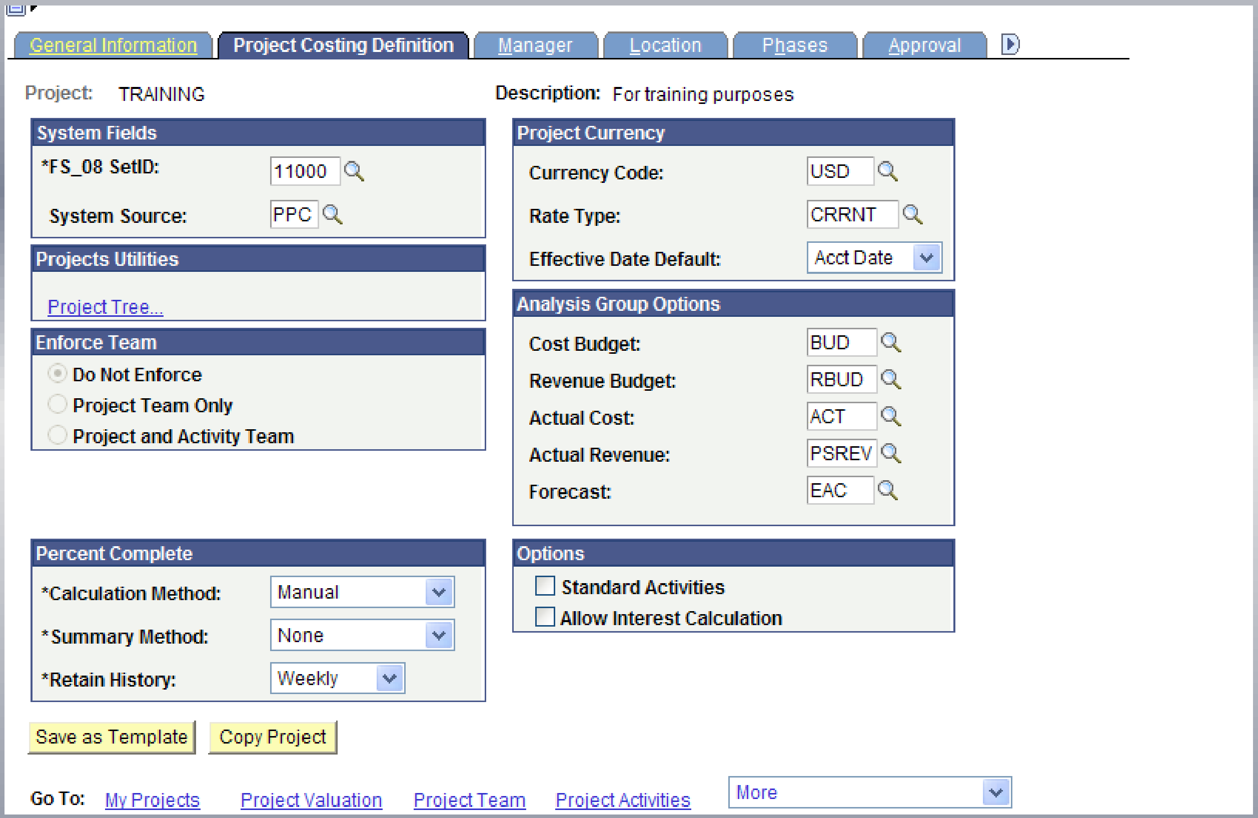
On the Projects general information screen there are additional tabs but may not use any more than before. But, you no longer have to go to the second tab "Project Costing Definition" to set a project up to be copied. Just click on the Save as Template button on the bottom of the Screen.





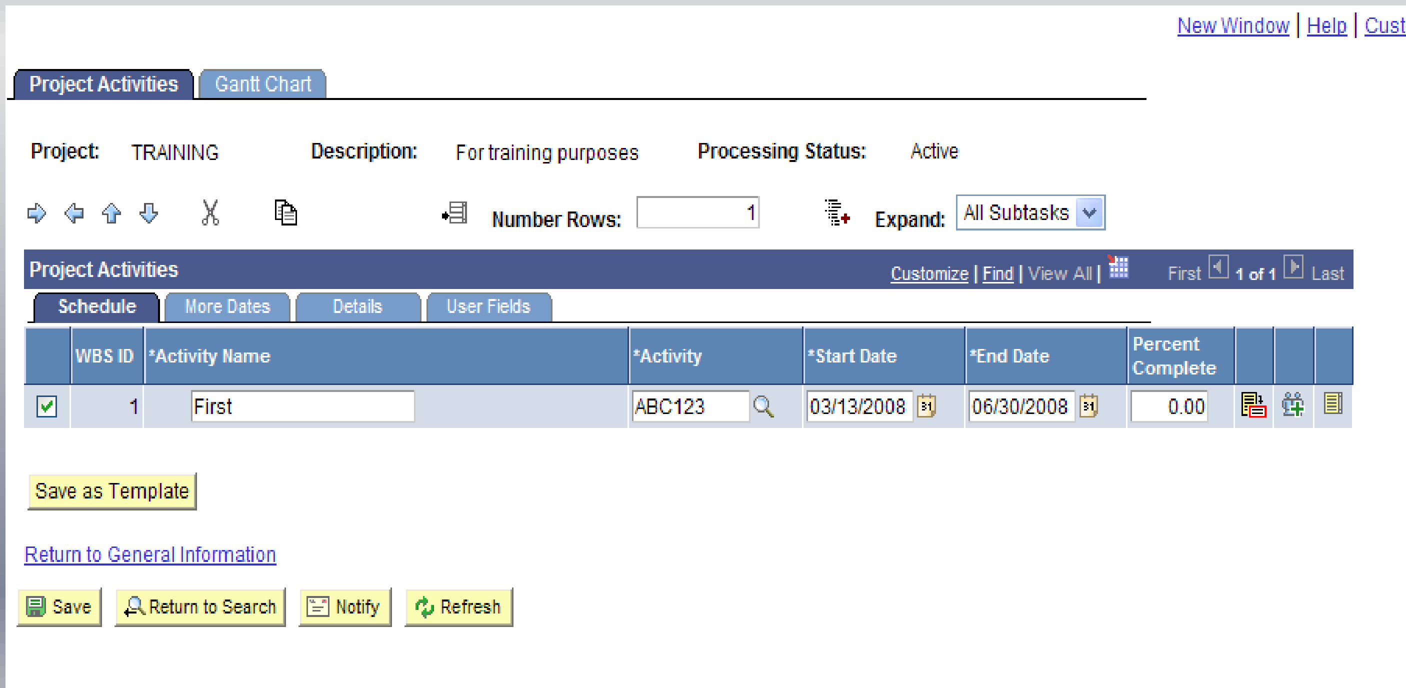
You need to give the Project Template a name and check it Private or Public. The Default is to Private. If Private, only you can use the template. If Public, anyone in your Business Unit with access to add projects can use it. Then Save. The project template will include the project and all of the activities for the project.

You would however want to go to the Project Costing Definition tab if you use Standard Activities. It is on this page, you would check if the Project is to use Standard Activities.

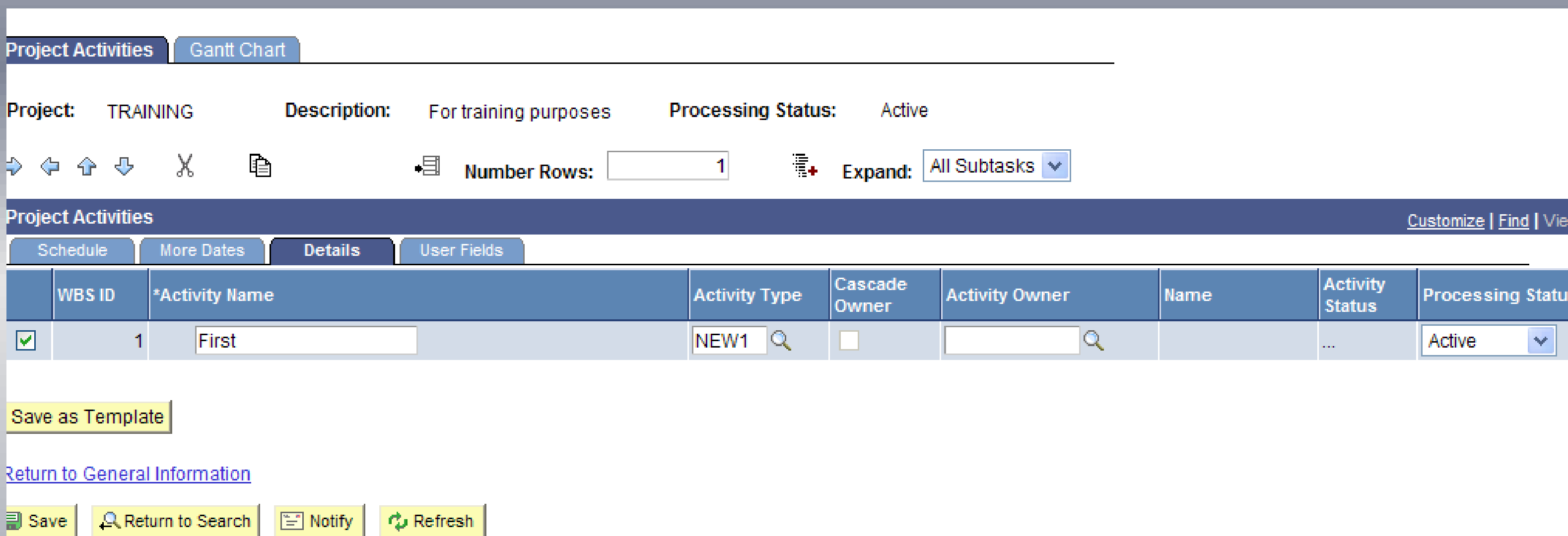


To add activities for the project, click on the Project Activities hyperlink at the bottom of the page—this can be done from the first tab screen. This will bring you to the Project Activities Screen

There are several activities’ tabs on this page so you no longer have to go to the Activity Details screens for activity details. On the first screen under the Schedule tab, you will fill in the activity name (formerly description) and activity (formerly activity ID). To add a second activity, you need to check the box by the first activity and then click the add button to the left of the number of rows box and fill in the number of rows you want to add. The start and stop dates on this screen will default to the same ones as on your project screen and are informational only.

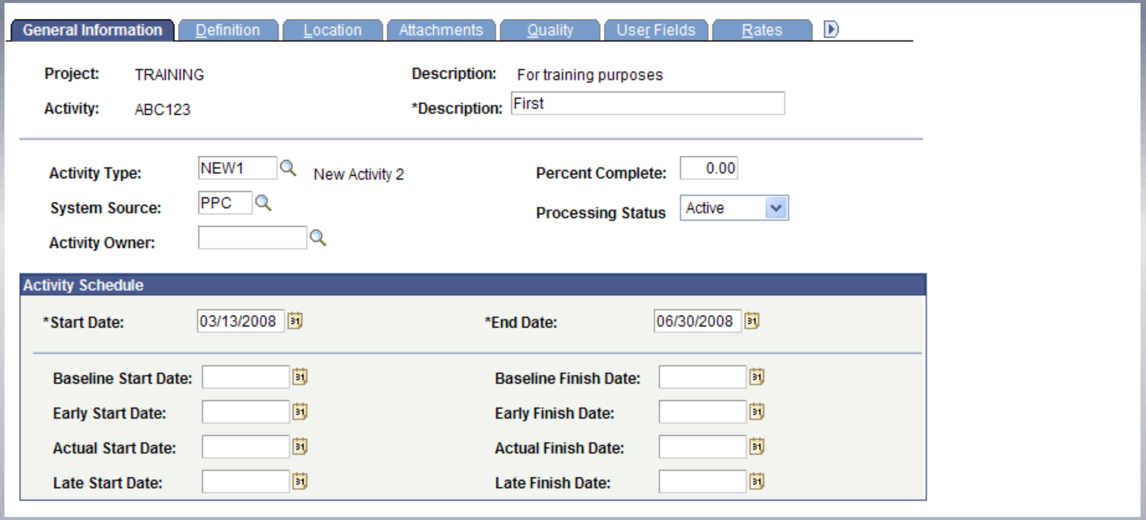


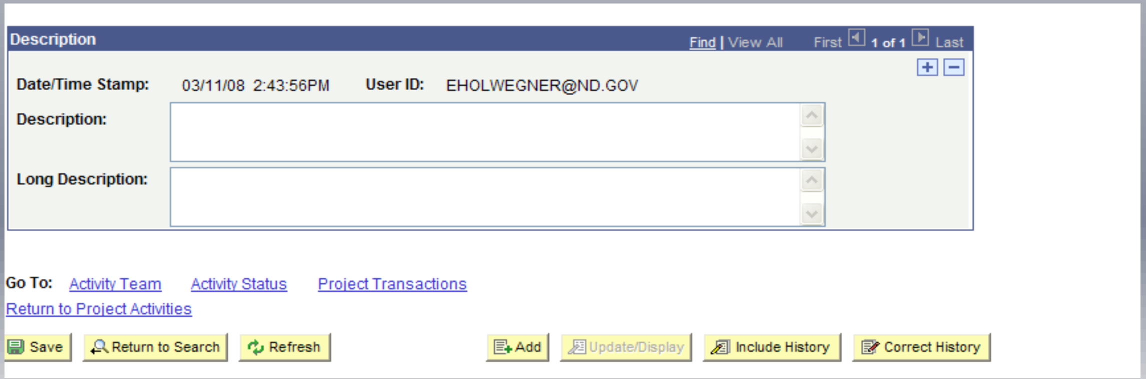
On the Details tab, you can choose an Activity type if you use those. Also, this is where you chose either an Active or Inactive Processing Status for each activity. Processing status is not effective dated for activities.



If you choose Save as Template on the Activities Screen, you will see the same screen as if you chose this on the Projects Screen. The projects and all activities for the projects are saved in the template.

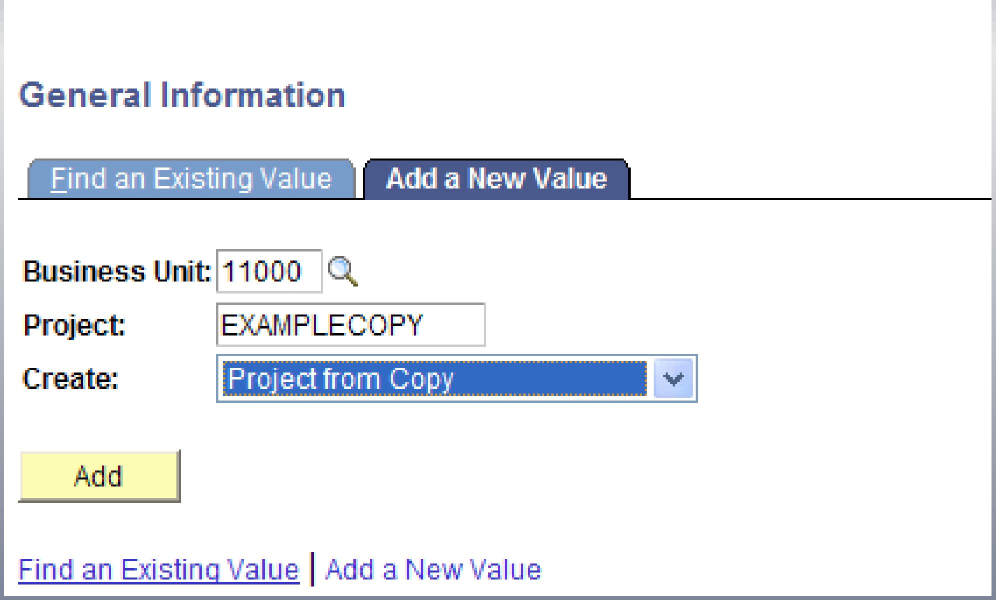
If you click on the Activities Definition button to the right of the percent complete box on the Activities Schedule tab, you will get the following screen, which is similar to the former Activities detail screen. There are more tabs on this screen, but most people are not using any of these other tabs now. You will also see this screen if you add activities to a project using the navigation Projects Costing>Activity Definitions>General Information.



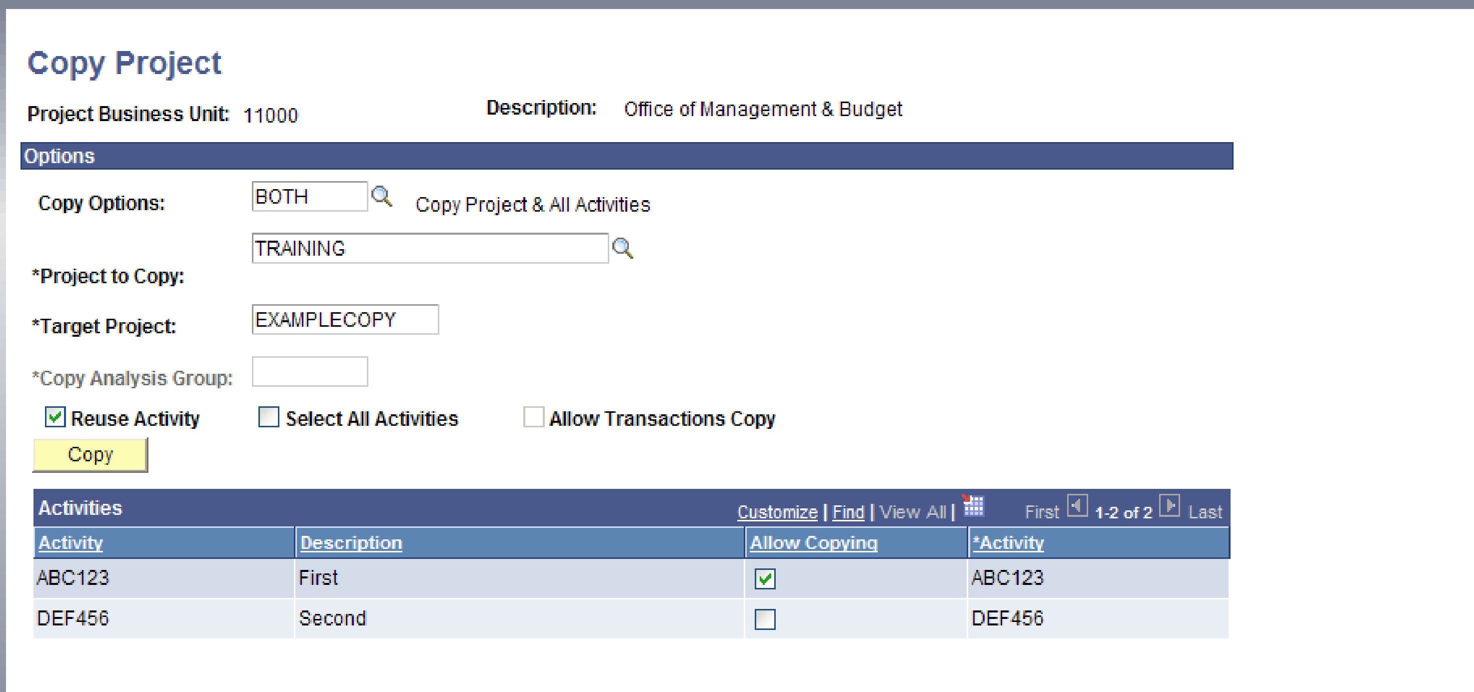


You can create a new project by copying another project using the add a new value under Projects Costing>Projects Definition>General Information and selecting copy from project under the drop down box or you can use the Copy Project button on the first project screen for the project you want to copy.

Creating a new project from the General Information screen below:

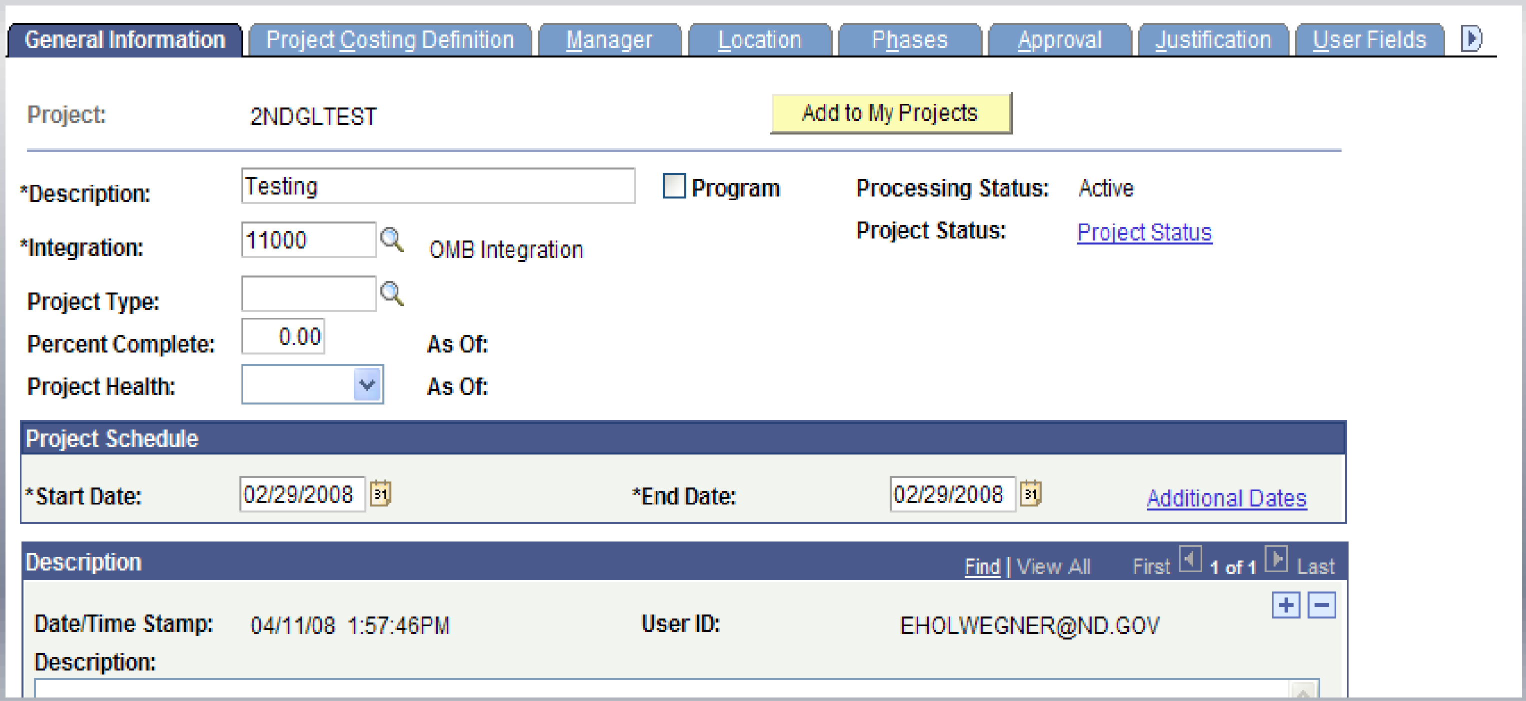


The copy project screen didn't change. You select your copy options, the project you want to copy and the name of the new project. You can select all or some of the activities. Click on the copy button.

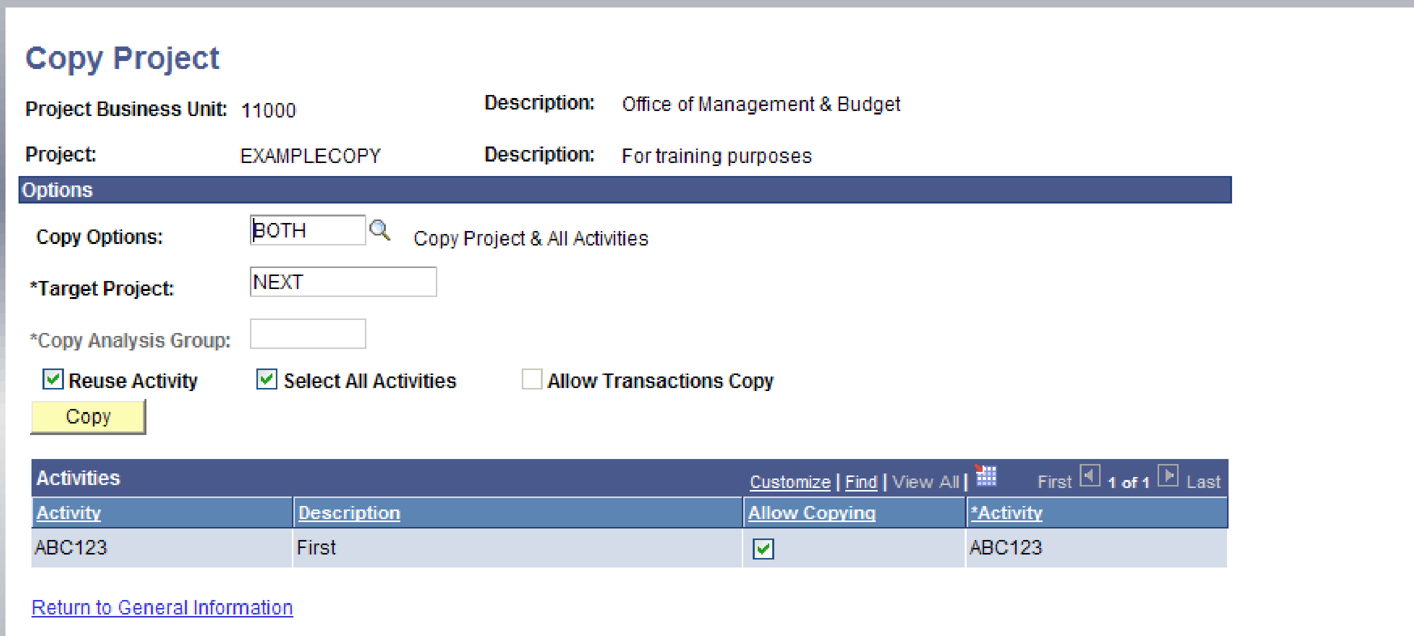


Once you have created the new project, you will need to change the Project Status by clicking on the Project Status hyperlink. There is no project status until you select one. However the Processing Status is Active, so you need to select either approved or open for the project status. As before, if you want a different status, you will need to add them on the status page.

You need to change the Project Status when using the copy project feature and the Processing Status will be ACTIVE as it has been copied from the project copied. You will be able to use this new project with transactions even if you have not selected a Project Status. It is the Processing Status that allows the project to be used with transactions.

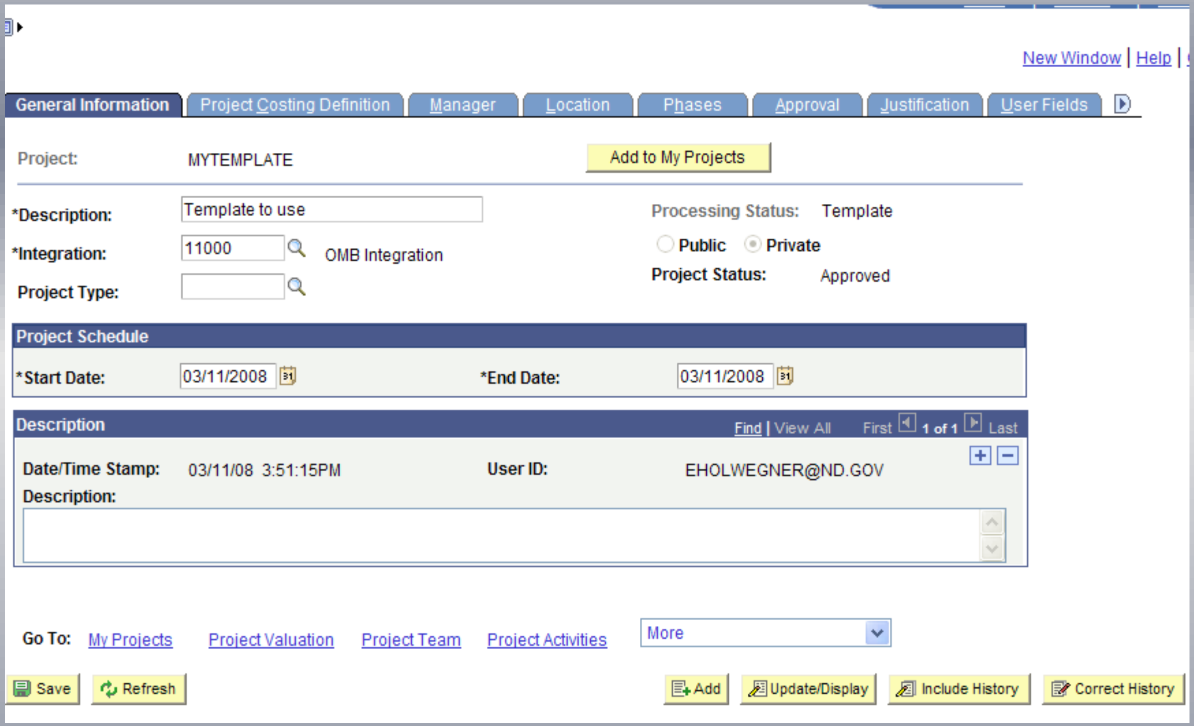


To create a new project using the copy button, find the project you want to copy and on the General Information tab, click the copy button.



The copy screen is the same as the screen that you get when creating a project from the Add a New Value tab create Project from Copy screen except you do not choose the project you want to copy, that comes up automatically with the Project you used in clicking the copy button. Again when you go to the new project created, you will need to select the Project Status.

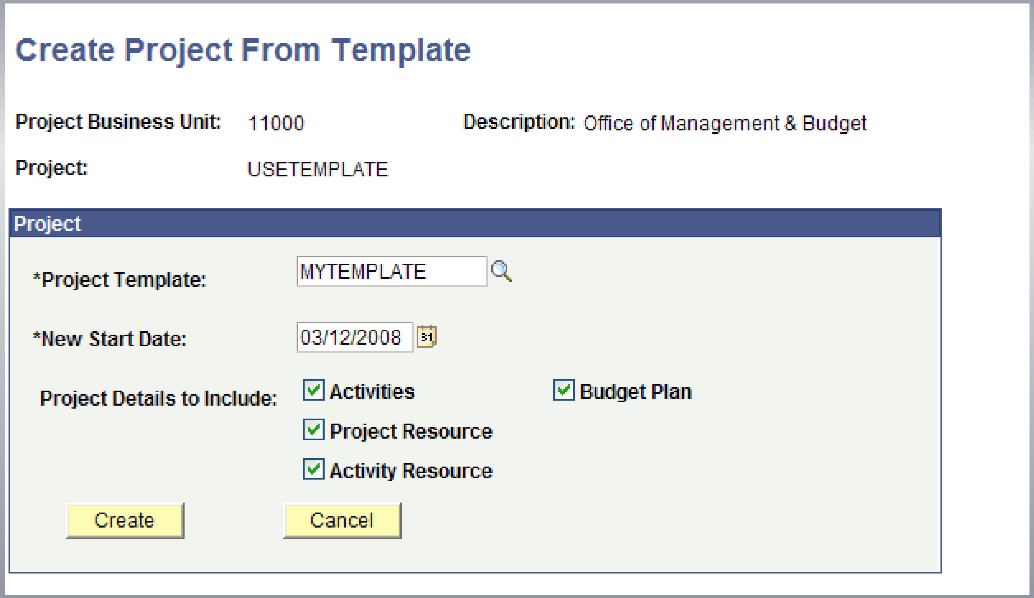
To create a Template to use for Projects: **Navigation> Project Costing >Project Definitions>General Information** and use the Add a New Value Tab. Give your Template a name and under the Create drop down box, select **"Project Template."**



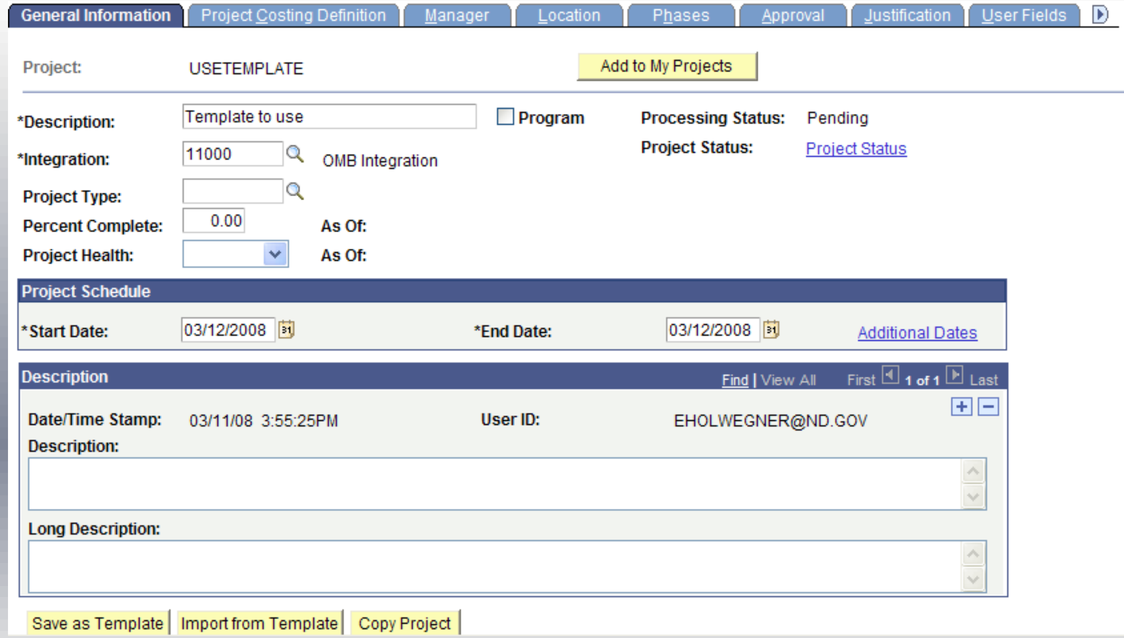
Templates have a Processing Status of Template and a Project Status of Approved. Neither can be changed as a template is not to be used with transactions. You will need to check whether or not the template is to be private or public. You add activities to a template using the Project Activities hyperlink. The status of the activities is also Template.

Creating a Project from a Template: Again use the Add a New Value Tab. Give your Project a name and under the Create drop down box, select “**Project from Template**.”

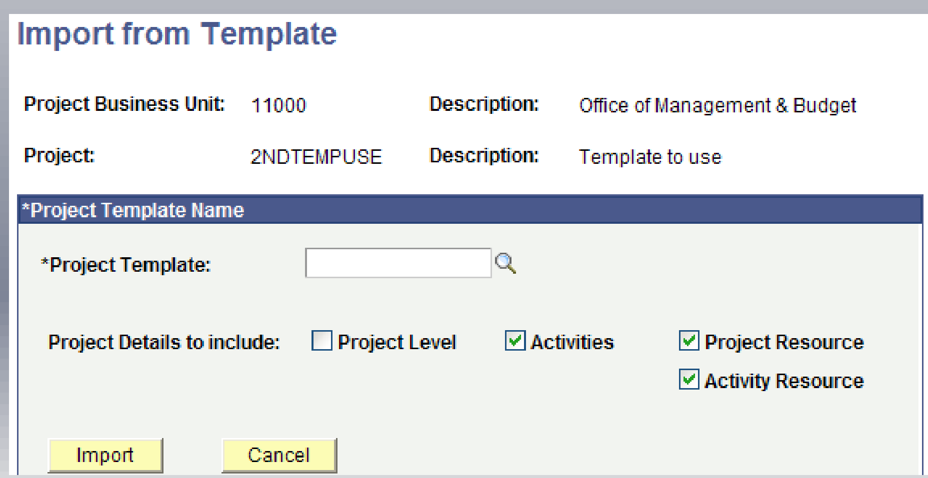
Select the template you want to use. You can change the Start Date here if you wish. Select the details to included. Note: There are no transactions for templates, so the Project resource and Activity resource details are not transactions. Then click the create button.



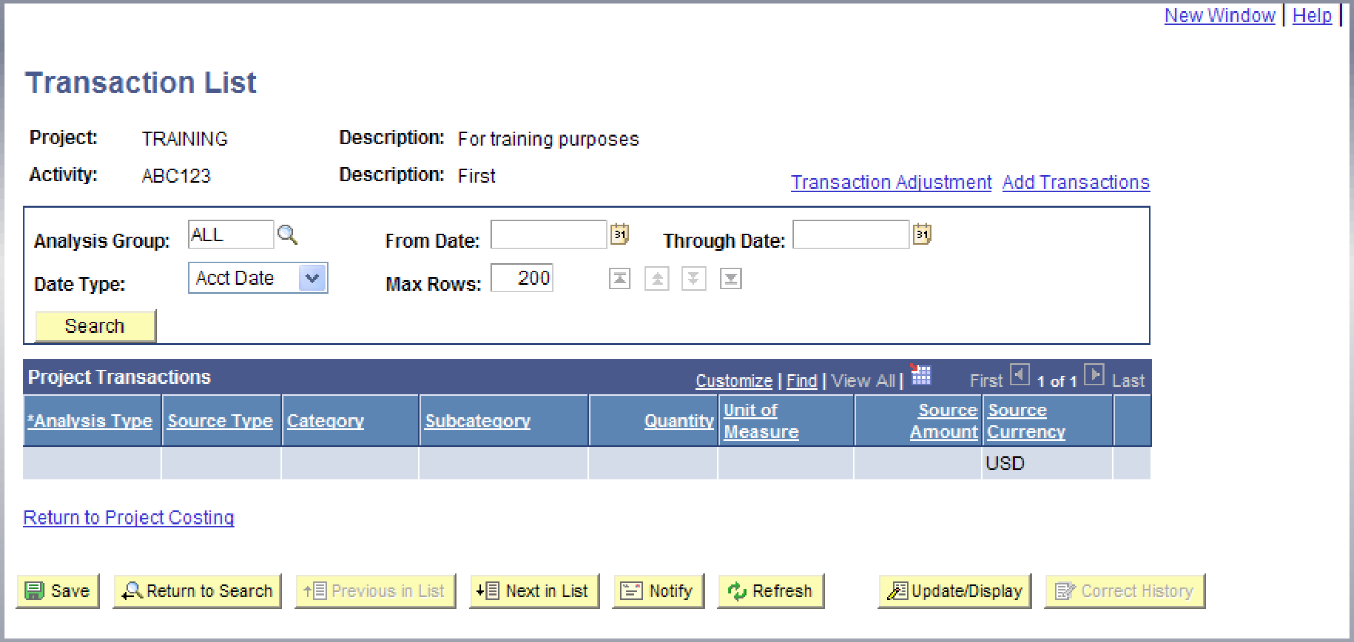
The new project created will have a Processing Status of Pending and the Project Status will need to be set up. You can choose from the various Project Status Options for this project as the Processing Status is Pending and not Active.



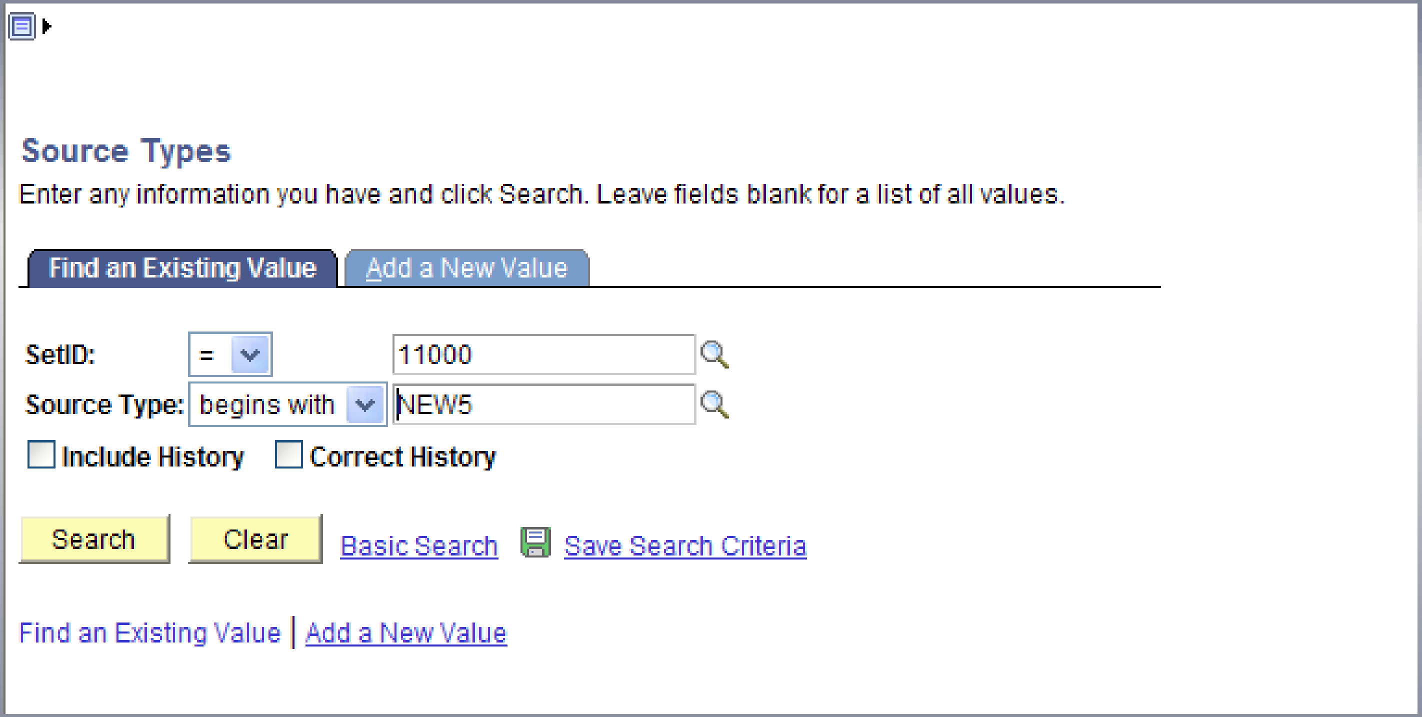
If you created a project from a template, you will also have a button called Import from Template. This button is available only before you change the Project Status and save the project. You can use this button to import more activities from another template or from the same template if you didn't check the activities box when you created the project. Once you click the import button, it will override any identical information in your project, such as duplicate activities.



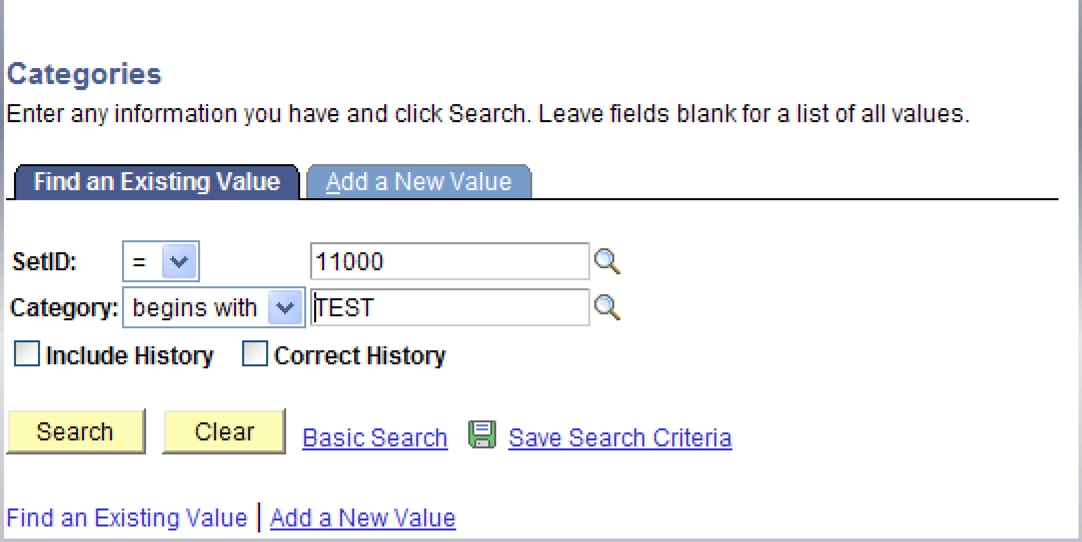
Project Resources are now Transactions. To view transactions on-line, the navigation is **Project Costing>Transaction Definitions>Transaction List.** The Screen to view the transactions didn't change.

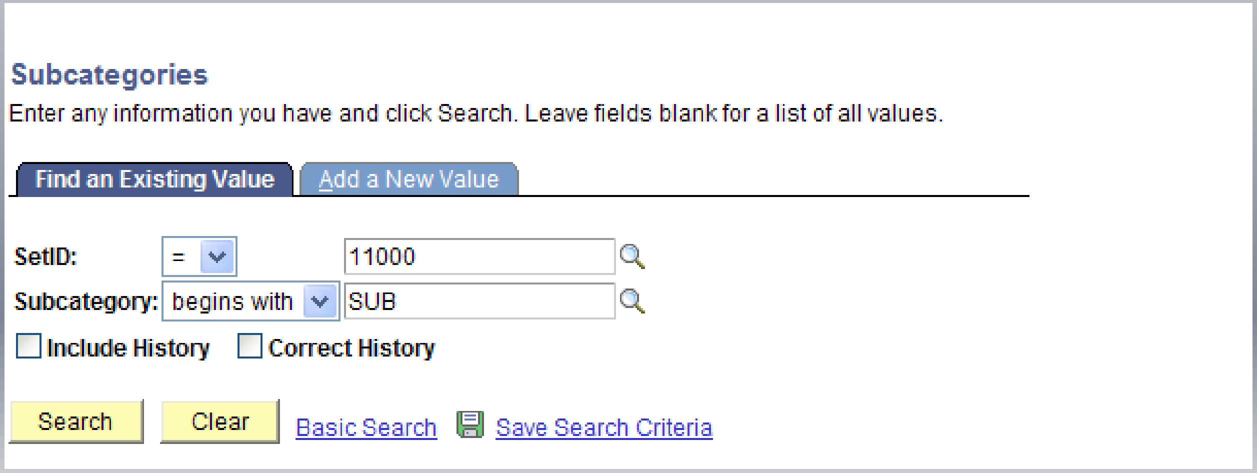


Resource Types are now Source Types. Navigation to set up source types is **Set Up Financials/Supply Chain>Product Related>Project Costing>Transaction Options>Source Types**



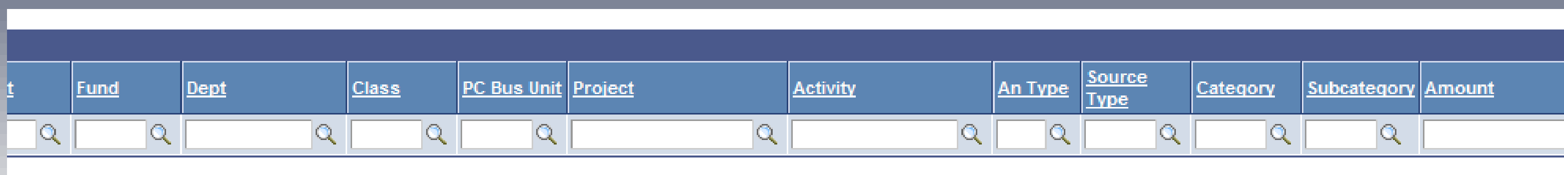
Resource Categories and Resource Subcategories are now just Categories and Subcategories. The Navigation to add or view these for your Business unit is the same as for Source Type above, except the last selection is Categories or Subcategories.





General Ledger and Accounts Payable distribution lines now have all the blanks for project information in place of having to click on the Projects hyperlink.

New look for General Ledger distribution lines:



New look for Accounts Payable distribution lines: